IDC MarketScape

IDC MarketScape: Worldwide Experience Build Services 2023–2024 Vendor Assessment

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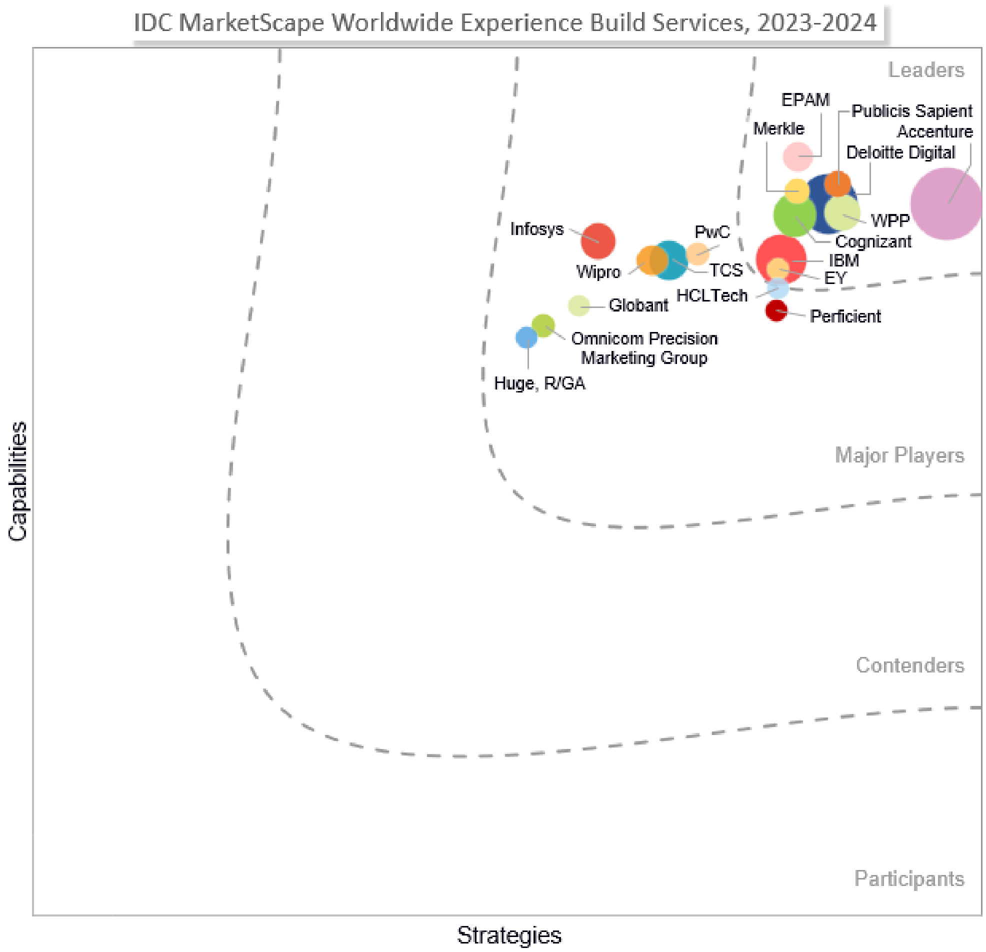
THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Experience Build Services Vendor Assessment



Source: IDC, 2023

Please see the Appendix for the detailed methodology, market definition, and scoring criteria.

December 2023, IDC #US49988323e

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Experience Build Services 2023–2024 Vendor Assessment (Doc # US49988323). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents a vendor assessment of the 2023–2024 experience build services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate the vendor's ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide experience build market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing experience build services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of experience build services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions.

Key findings from the evaluation include the following:

- Feedback from calls with reference clients and feedback from IDC's field survey of buyers of experience build services both indicate that buyers of these services are most impressed by the **quality of vendors' people**, followed by vendors' **client understanding and insight** and by vendors' **ability to drive value through experience build activities**.
- Reference clients and IDC's field survey also agreed on what experience build services buyers find weakest about their vendors — their **differentiation** from other vendors. Both reference clients and survey respondents also agreed on the other two areas where vendors performed the least strongly: in providing **innovation and creativity** during the build phase of engagements and in providing **value for money**. Reference clients viewed vendors' ability to provide value for money a little higher than their innovation and creativity, while survey respondents reversed the order of these two.
- Overall, the story is a good one — vendors are getting the basics right by hiring and training good people who understand their clients well and who (as a result) do a good job of generating business value for their clients.
- The areas where vendors are weak have been long established and should come as little or no surprise:
  - Differentiation from competitors is a perpetual weak spot for most vendors in professional services, where the quality of *individual* professionals often makes a difference (in client perceptions, at least) to project success.
  - Value for money is also a perpetual grouse for clients, who always want more for less. There's probably an element of conscious or unconscious "negotiation" going on when organizations say they want better value for money from vendors. And who in their right mind doesn't?
  - Creativity is also often cited as a weakness by clients. The paradox is that although organizations want assured outcomes and predictable — even industrialized — delivery from their customer experience (CX) services providers, they also want an element of un-industrial "craft-like" services and the unpredictability that can come from lateral thinking

and innovation. Essentially, clients want a balance of locked-down industrialization and free-ranging creativity. That balance is hard to provide — in fact, being able to supply that paradoxical balance is often what distinguishes truly great CX services players.

- In terms of the areas assessed by IDC, rather than by vendors' clients, the vendors in this assessment on average were rated highest for their **supporting assets and tools** and for their capabilities in providing **personalization services** and **data and analytics**-related services.
  - Supporting assets and tools are a generic "table stakes" requirement for providing all sorts of services, not just experience build services, and vendors' strength on average in this area demonstrates the extent to which the more successful vendors in the experience build market are often those with mature IT services delivery machines.
  - The relative strength of vendors' personalization and data and analytics capabilities is good to see, as these capabilities are important for ensuring that well-designed products actually go on to deliver great experiences for customers, users, and citizens over time. The success of these products and services is often driven by two things. First, they are well targeted to their users. Second, they can continually adapt to changing conditions because the organization collects and analyzes data from users of these products and services.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This assessment is part of a joint assessment during the second half of 2023 that produced two documents: the *Worldwide Experience Design Services 2023–2024 Vendor Assessment* and the *Worldwide Experience Build Services 2023–2024 Vendor Assessment*.

All four of the CX services "archetypes" are represented in both the Experience Design assessment and the Experience Build assessment:

- The "**strategy houses**" archetype is represented by McKinsey, BCG, and Bain. The strategy houses do not have large-scale global IT implementation capabilities and therefore appear only in the Experience Design assessment.
- The "**Big Four**" multidisciplinary professional services firms are represented by Deloitte, EY, and PwC.
- The "**digital agencies**" are CX services firms that come from a heritage of marketing or advertising. These are represented chiefly by the five largest worldwide "holding companies": denstu, Interpublic, Omnicom, Publicis, and WPP.
- The "**global consulting and IT services firms**" are represented by Accenture, Cognizant, EPAM, Globant, HCL, IBM, Infosys, Perficient, TCS, and Wipro.

For more on the CX services archetypes, see *IDC PlanScape: Future of Customer Experience — Implementing Customer Experience Suites Using a CX Services Partner* (IDC #US49971223, January 2023).

Within the category of global consulting and IT services firms, inclusion criteria for both assessments were the vendor being a top 10 provider of CX services by estimated 2020 revenue, the vendor having revenue of at least $500 million in estimated experience design and build revenue, and the vendor having a global practice(s) dedicated to experience design and build activities.

For all the archetypes, vendors had to have a geographic balance where no macro-region accounts for 75% or more of experience design and build revenue.

ADVICE FOR TECHNOLOGY BUYERS

IDC has the following advice for organizations looking to buy consulting and implementation services that build great experiences by turning design into on-the-ground reality:

- **Look for client understanding and insight**. Look for vendors that understand not just your business strategy and your customers but also your organizational culture (and your internal politics, too). The best advice and the best design usually come from a vendor that understands not just what the client organization wants to achieve — which is obviously important — but also both the strengths and limitations of its client and how culture and internal office politics both enable and constrain people with the organization. The best strategies and designs are useless unless they can be implemented and scaled efficiently and effectively by the client, and this often relies as much on the culture and politics of the client's organization as it does on the proverbial feasibility, desirability, and viability of the design itself.
- **Look for business and technology transformation capabilities**. Look for a vendor that understands the importance of technology and process change when creating new experiences and that has a track record of driving successful organizational and technology change among its clients. New products and services — new experiences for customers, consumers, and citizens — usually require the implementation or transformation of technology, such as cloud-based experience software suites, and the creation or transformation of processes, workflows, and ways of working. These capabilities are often backed by industrial-strength tools and assets, benches of business and IT consultants, and certified specialists in experience clouds from vendors such as Adobe, Salesforce, Oracle, and Microsoft. The most capable vendors are those that straddle the world of experience design on the one hand and the world of technology and business change on the other.
- **Look for a focus on client empowerment**. Look for a vendor with a track record of empowering its clients rather than leaving them dependent on their professional services supplier. The best consultancies are those that want clients to come back for the next project and that leave the client fully empowered at the end of the engagement rather than wanting clients to stay dependent on their consultancy. That's not to say that clients should not contract with consultants for post-project support and managed services, but this follow-on work engagement should be an option, not an inevitability. Like the perfect house guest, a good consultant knows when to leave gracefully.
- **Look for an understanding of the importance and potential of analytics and personalization technologies** in creating and maintaining great experiences. While the design of an experience is important, it's also critical to build the right level of personalization into products and services and to ensure that these products and services — and the experiences they generate — remain relevant and focused on the needs of customers, consumers, and citizens. That means that vendors should ensure that clients have the targeting capabilities and the data and analytics that they need to sustain great relationships with customers, consumers, and citizens.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Accenture

According to IDC analysis and buyer perception, Accenture is positioned as a Leader in the 2023–2024 IDC MarketScape for worldwide experience build services.

Accenture has approximately 733,000 employees and has operations in more than 200 cities in 49 countries. Clients include more than three-quarters of the Fortune Global 500.

Accenture has five global service lines: Strategy & Consulting, which helps clients transform their organizations; Song, which helps clients grow businesses by creating relevance for their customers; Technology, which provides IT consulting and implementation services that enable organizations to realize greater business value from technology; Operations, which provides managed services to help clients build intelligent new operating models; and Industry X, which helps clients reimagine their products and how they make them.

Accenture has expertise in more than 40 industries, including automotive, banking, capital markets, chemicals, communications/media, consumer goods, energy, food and beverage, freight and logistics, health, industrial equipment/manufacturing, insurance, life sciences/pharmaceuticals, natural resources/metals and mining, retail, software/technology, travel, utilities, and public service/government.

Key Accenture clients include Signet Jewelers, IHG Hotel & Resorts, Prada, Minna Bank Tuvalu, Smart Car, and Colombia (for this research, IDC did not collect any feedback from these clients).

Accenture has global Platinum-level or equivalent alliances with experience platform providers, including Adobe, Microsoft, Oracle, Salesforce, and Sitecore. In late 2023, Accenture held 24 Adobe Regional Specializations and six Global Adobe Specialisms. In Salesforce, Accenture was certified in 14 technology clouds, including five clouds at the expert level, and was certified in 12 industry clouds, including 11 clouds at the expert level.

- Accenture's **personalization** capabilities include integrated experience platforms services, which enable customer-facing experiences for scalable growth and performance, integrating channels across marketing, commerce, sales, and service; and digital product capabilities, which include production management, product design, and agile delivery to build CX-led software using microservices, platform customization, testing, and DevOps.
  - Accenture's personalization tools and assets include Accenture Personalization Suite, which among other things includes Customer Genome, a tool to create individualized experiences based on individual customers' motivations; segmentation tools and real-time recommendation engines; and Accenture Customer Data Architecture, a framework created in partnership with Google.
- Accenture's **data and analytics** capabilities include artificial intelligence (AI) and personalization capabilities and combine industry, data, and artificial intelligence expertise, along with repeatable cloud ecosystem innovation to help clients create business value from

data. Offerings include Data Migration, which helps clients replatform their data environments, and Data Platform Modernization, which helps clients build enterprise data platforms.

  - Accenture's data and analytics tools and assets include Scaled AI/ML, which helps clients build and scale AI foundational systems, and a large number of proprietary and industry-standard frameworks, tools, and accelerators.

Accenture has a number of key intellectual property assets to help its clients build their digital strategies, including the following:

- Accenture Personalization Suite, mentioned previously, which includes Customer Genome and Accenture Customer Data Architecture, a framework created in partnership with Google
- AI Navigator for Enterprise, a generative AI-based platform with industry- and function-specific modules that will help clients define business cases, make decisions, navigate AI journeys, choose architectures, and understand algorithms and models designed to accelerate responsible AI practices
- Scaled AI/ML, a collection of AI and machine learning (ML) assets and accelerators
- myNav, a platform to assess, design, and simulate cloud and infrastructure solutions
- Transformation GPS, a benchmark-based predictive and prescriptive change analytic
- myDiagnostic, a platform for assessing an organization's business and IT maturity

Accenture makes frequent acquisitions to strengthen its experience business. Recent acquisitions include Fiftyfive5, Romp, The Stable, Tambourine, King James Group, Experity, Glamit, Openmind, Bionic, and Entropia.

Accenture Song says that its mission statement for building experiences is as follows: "Bold new creative solutions, delivered at a faster pace than ever before. These solutions will be the next great frontier for business growth, and they require a brand-new approach — one that widens a business' aperture and utilizes the full power of creativity, intelligence, technology, operations, industry, and ecosystem knowledge. We call this approach life centricity."

Strengths

Accenture's design and marketing-focused capabilities are backed by broad and deep capabilities in consulting and IT services, including a strong set of supporting assets and tools. Accenture also has broad and deep capabilities in experience services, through Accenture Song, with strong capabilities in personalization, data/analytics, and business transformation. Accenture was placed in the Leaders category in IDC's *Worldwide Adobe Experience Cloud Professional Services 2022 Vendor Assessment*. Based on conversations with Accenture's clients, the three most highly commended areas were people quality, vendor differentiation, and value creation.

Challenges

Based on conversations with Accenture clients, the vendor has the opportunity to improve its perception among clients in innovation and creativity during the build phase of engagements and in value for money.

Consider Accenture When

Accenture is potentially a good choice for organizations that want a deep and extremely broad range of business and technology transformation capabilities combined with one of the largest benches of consulting and implementation talent available.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis. indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The sizes of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

The 18 vendors in this assessment represent, in IDC's view, the most important global providers of experience build services based on the breadth and depth of their experience build capabilities and their global reach.

However, the vendors in this assessment are not necessarily the only vendors worth considering for either global or regional business and technology change projects involving experience build. An organization should normally consider where it can use vendors not included in this assessment, dependent on the scope of its needs.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Experience build services are technology-enabled implementation services that help clients build products and services that provide a useful and/or enjoyable experience for their users. Specifically, an important goal must be that the consumer of these products or services has an optimized experience. In this context, "services" being built can include customer/user-facing events and channels such as marketing, sales, commerce, and customer service channels.

- Experience build services can include project services to build customer/citizen-facing applications, specifically persuasive content management applications and creative applications, as defined in IDC's Worldwide Software Taxonomy.
- Experience build services can include professional services to implement or improve packaged software platforms, such as Adobe Experience Cloud and Salesforce Experience Cloud. For example, it could include the following:
    - Customer service platform build services, which are IT project services to build customer service applications and contact center applications
    - Commerce platform build services, which are IT project services to build digital commerce applications
    - Marketing and advertising platform build services, which are IT project services to build marketing campaign management applications and advertising applications
    - Sales platform build services, which are IT project services to build sales force productivity and management applications

LEARN MORE

Related Research

- *Market Analysis Perspective: CX Services, 2023* (IDC #US49772123, October 2023)
- *Future of Customer Experience: How CX Services Providers Should Support CMOs with Generative AI* (IDC #US51262123. October 2023)
- *Worldwide and U.S. Customer Experience Services Forecast, 2022–2027* (IDC #US49360722, July 2023)
- *IDC Market Glance: Customer Experience Services, 2Q23* (IDC #US49360923, June 2023)
- *IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2022 Vendor Assessment* (IDC #US47542221, June 2022)
- *IDC PlanScape: Future of Customer Experience — Implementing Customer Experience Suites Using a CX Services Partner* (IDC #US49971223, January 2023)

Synopsis

This IDC study represents a vendor assessment of the 2023–2024 experience build services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide experience build services market.

This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing experience build services in both the short term and the long term. A component of this evaluation is the inclusion of the perception that buyers of experience build services have of both the key characteristics and the capabilities of the provider evaluated. Buyers were surveyed across all three of IDC's macroregions for the vendors participating, and IDC spoke to almost 60 reference clients of participating vendors.

"Customer experience has never been more important than it is today, and organizations must ensure that their products and services generate a great experience from day one," says Douglas Hayward, research director for Customer Experience Services at IDC. "That means building products and services to deliver immediate impact, functional excellence, scalability, and constant improvement so that they continue to meet evolving consumer and citizen expectations over time. For most organizations, this means choosing a professional services partner that has broad and deep IT and business transformation skills, including the ability to deploy technology to identify and understand the people who count most to organizations — their customers and citizens."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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